

LIRA Department Review

February 22, 2023



Agenda for today

- Introductions and housekeeping
- LIRA launch date
- Overview of LIRA Funding Proposal Workflow
- What is required for Department review
- How to request clarifications
- How to approve a proposal
- Demo of Department Review in LIRA
- Q&A
- What's next?

Intros and Housekeeping

What is LIRA?

- Online system that will be used to develop, route, review, and submit sponsored project proposals
 - System communicates directly to some Federal sponsors through grants.gov for system-to-system proposal submission
- Create, negotiate, and track agreements
- Funded award set up
- Create and track subawards
- Request modifications to funded awards

Why LIRA?

- Lack of system for research administration; Paper based, email exchange process
- Current processes are outdated, not integrated and are not sustainable
- LIRA (Huron Research Suite) is used by more top research universities than any other research administration technology and is implemented at more than 50% of R1s
- LIRA will help to streamline our processes
- Improve overall efficiency and consistency with Lehigh's Research Administration

LIRA is not....

- LIRA is not a replacement for Desktop Finance or Banner
- All financial transactions and related reporting will continue to be in Banner, not LIRA
- You will still use Desktop Finance, Argos, or related tools to access your grant financial data

LIRA Go-Live Date

- Go live date is March 6 - all proposals will be submitted through the system, and all data will integrate with Banner
- We are importing:
 - All pending proposals
 - (5) years of award history
 - All active awards

Overview of LIRA Funding Proposal Workflow

Funding Proposal Workflow

- Current process at Lehigh is Department chair/approver receives the *transmittal form* **after** a proposal has been reviewed and submitted to the sponsor by ORSP
- If there are any issues with the information on the transmittal form, the proposal has already been submitted and it is too late to address them
- LIRA will adjust this workflow so that the department will review **prior** to the proposal being submitted to the sponsor

Funding Proposal Workflow

proposal submitted
here



**What is required for
department review?**

What is required for department review?

ORSP PROPOSAL TRANSMITTAL FORM Date: CGS:

Proposal Information

LU Proposal Number: Requested Amount: IC % and Basis:

Agency: Due Date:

Title:

Start Date: End Date:

Principal Investigator: Please respond to all of the following questions (complete blue fields)

- Were paid lobbyists used to secure funding? No Yes
- Is this proposal the result of an InfoEd Notice? No Yes
- Does the project involve Human Subjects? No Yes
- Does the project involve Vertebrate Animals? No Yes
- Does the project involve In Vitro Formation of Recombinant DNA? No Yes
- Environmental Health and Safety: Does the project involve:
 - Radioactive material / radiation? No Yes
 - Radioactivity-producing equipment? No Yes
 - Potentially infectious agents, including human blood/tissue? No Yes
 - Hazardous materials / gases? No Yes
 - Human Carcinogens? No Yes
 - Lasers? No Yes
- Does the project involve:
 - Existing patents or proprietary information? No Yes
 - Program Income? No Yes
- Will Major Instrumentation be used? No Yes
 If yes, have equipment use fees been budgeted? No Yes
- Building Name(s) and Room Number(s) where research will be performed:
- Indirect Cost Distribution:
 - Department% and/or Center/Institute%:
 - PI% and/or Co-PI(s)%:
- Please list all personnel (i.e. Co-PIs, Sr. Personnel, Dept. Coordinator, Business Manager) who should have access to information regarding this project, and their authorization(s) (i.e. Banner access, Authorized Signer, Payroll Reports, All)

Certifications / Approvals (sign in blue field)

- PRINCIPAL INVESTIGATOR(s)/PROJECT DIRECTOR(s):** The undersigned certify that they are not, to the best of their knowledge, excluded from participation in federally-funded activities as a result of government-wide suspension or debarment.

PI:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Co-PI:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Co-PI:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Co-PI:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
- DEPARTMENT CHAIR or CENTER/INSTITUTE DIRECTOR:** The referenced application is approved. It is within the total program and academic objectives of the Department. Adequate space is available or planned for the conduct of the project. The professional time allocations described therein are realistic.
 Chair / Director:
- ORSP or AUTHORIZED INSTITUTIONAL REPRESENTATIVE:**

What is required for department review?

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Co-PI:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
- DEPARTMENT CHAIR or CENTER/INSTITUTE DIRECTOR:** The referenced application is approved. It is within the total program and academic objectives of the Department. Adequate space is available or planned for the conduct of the project. The professional time allocations described therein are realistic.
Chair / Director:
- ORSP or AUTHORIZED INSTITUTIONAL REPRESENTATIVE:**

Will no longer use the transmittal form!
Instead, the information on the form will be reviewed within the LIRA funding proposal and budget forms

What is required for department review?

- The following information within the LIRA funding proposal and budgets will need to be reviewed:
 - PI Effort on the project
 - Any committed cost share
 - Equipment
 - Space/Location

Reviewing a funding proposal and requesting clarifications

Reviewing Funding Proposal

Project Types

Funding Proposal

Main Component. Contains all the data and relationships necessary to describe the full scope of a Proposal.

Budget

Includes Sponsor, Cost Share and Subaward budgets.

SF424

Contains the application information that is submitted to Grants.gov

Reviewing Funding Proposal

Submission Information

Funding Opportunity Announcement

10. Building name(s)/room numbers(s) where research will be performed:

Building Name / Room Number
There are no items to display

Change History

Reviewer Notes Close

Add New Reviewer Notes

Department Draft Change Request

Please enter the building name(s) rooms where research will be performed

Response Required Attach Files OK

Drop files in the text area to upload

Reviewing Budget

- View budget and on Personnel Costs tab, you will review the PI effort here:

Personnel Costs

	Period 1 7/1/2023 6/30/2024	Period 2 7/1/2024 6/30/2025	Period 3 7/1/2025 6/30/2026	
Person: Sarah Riccaboni Role: PD/PI	Effort:	11.11%	11.11%	11.11%
	Sal Req:	11.11%	11.11%	11.11%
	FB Rate:	31.3%	31.3%	31.3%
	Base:	\$74,997.00	\$74,997.00	\$74,997.00
	Salary:	\$8,332.00	\$8,332.00	\$8,332.00
	Benefits:	\$2,608.00	\$2,608.00	\$2,608.00
	Total:	\$10,940.00	\$10,940.00	\$10,940.00

Reviewing Budget

- View budget and on General Cost Definition tab, you will review any equipment

Edit General Cost

1. * General cost type:

Equipment

2. Cost:

\$15,000.00

3. Description:

Equipment

4. Apply inflation?

Yes No

Reviewing Budget

- Any comments needed on the budget, you will enter via “log general comments” on the budget workspace



The screenshot displays a budget workspace for the National Science Foundation. On the left sidebar, there is a yellow 'Under Review' status bar. Below it, under 'Next Steps', are buttons for 'View Budget' and 'Printer Version'. A red box highlights the 'Log General Comments' button, which includes a speech bubble icon. Below that is a 'Manage Tags' button with a gear icon. The main content area shows the title 'National Science Foundation' and a table of metadata:

Sponsor:	National Science Foundation
PI:	Sarah Riccaboni
Funding Proposal:	LIRA Budget Training 1.18.23

Below the metadata is a navigation bar with tabs for 'Financials', 'Subaward', 'Documents', 'Snapshots', and 'History'. The 'Financials' tab is currently selected. Underneath the navigation bar, the text 'Current All-Period Totals' is visible.

Reviewing Budget - Logging Comments

- Enter comments in the designated space and select “OK”

Log General Comments

1. * Comments:

Please update your effort to 2 months

2. Attachments:

+ Add

Name

There are no items to display

OK Cancel

Reviewing Budget - Cost Share

- Select the cost share budget (if applicable) in the proposal workspace to review and confirm cost share commitments

General Cost Definition

1. General costs:		
Cost Type	Description	Cost
Other	Cash - ORSP	\$5,000.00

General Costs

Budget Summary

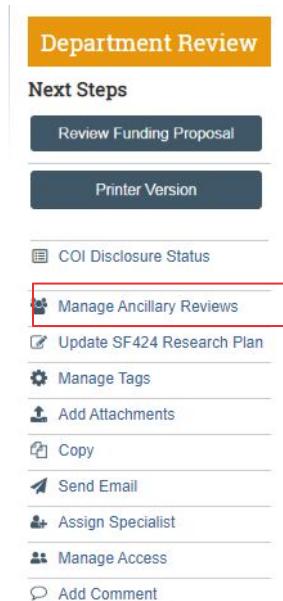
	Period 1 7/1/2023 6/30/2024	Period 2 7/1/2024 6/30/2025	Period 3 7/1/2025 6/30/2026	Budget Totals
General Total:	\$5,000.00	\$5,000.00	\$5,000.00	\$15,000.00
Direct Total:	\$5,000.00	\$5,000.00	\$5,000.00	\$15,000.00
Indirect Total:	\$3,050.00	\$3,050.00	\$3,050.00	\$9,150.00
Grand Total:	\$8,050.00	\$8,050.00	\$8,050.00	\$24,150.00

General Costs

	Period 1 7/1/2023 6/30/2024	Period 2 7/1/2024 6/30/2025	Period 3 7/1/2025 6/30/2026
Cost Type: Other	\$5,000.00	\$5,000.00	\$5,000.00
Description: Cash - ORSP	\$5,000.00	\$5,000.00	\$5,000.00
General Cost Total:	\$5,000.00	\$5,000.00	\$5,000.00

Multi-Department Proposals: Ancillary Review when Lead

- Select Manage Ancillary Reviews Activity in proposal workspace to show if any additional departments have been notified to review proposal



The image shows a vertical sidebar menu titled "Department Review". Below the title is a "Next Steps" section containing two buttons: "Review Funding Proposal" and "Printer Version". Below this is a list of activities, each with a small icon to its left. The activity "Manage Ancillary Reviews" is highlighted with a red rectangular border. Other activities include "COI Disclosure Status", "Update SF424 Research Plan", "Manage Tags", "Add Attachments", "Copy", "Send Email", "Assign Specialist", "Manage Access", and "Add Comment".

- Department Review
- Next Steps
 - Review Funding Proposal
 - Printer Version
- COI Disclosure Status
- Manage Ancillary Reviews**
- Update SF424 Research Plan
- Manage Tags
- Add Attachments
- Copy
- Send Email
- Assign Specialist
- Manage Access
- Add Comment

Multi-Department Proposals: Ancillary Review when not Lead

- You should receive an ancillary review to conduct a department review of proposal if you are not the lead department
- Once it has been sent, you will get an email notification with a link to the funding proposal for you to review
- Conduct your department review - Once complete, you will utilize the “Submit Ancillary Review” activity in the proposal workspace to confirm proposal has been reviewed

Submit for clarifications

- Once review is complete, if there are any updates needed to be made by the PI/Study staff, you will return the proposal via the “Request Changes” activity on the funding proposal workspace.
- This will send the proposal with all your comments into the “Clarifications Requested” state and will open it back up to the PI/Study staff to make your requested edits
- The proposal will then be returned to the “Department Review” state once the PI has made the changes and re-submitted the proposal

Approving the Proposal

Approve the Proposal

- If you have reviewed the proposal and it is approved, you will select the “Approve” activity on the funding proposal workspace activities section
- This will send the proposal to “Specialist Review” state and the assigned ORSP specialist will begin to review the full proposal

2nd Department Review

- If, during ORSP review, the PI or CGS recommends significant changes to the proposal including:
 - change in scope of the project/budget
 - Addition of a subaward
 - Addition of cost share
 - Addition of equipment

The specialist will require that the proposal goes back through department review for a second time. The process will remain the same for the review.

Department Approval Demo in LIRA

Q&A

Thanks!